

INDUSTRY | MANUFACTURING



Strato Inc. designs and manufactures products for the freight and transit rail industry throughout North America. Our 140+ employees are in the US, Canada, Mexico, Brazil, China, and India.

Challenge

Strato, Inc. sought to use Salesforce to enable its Sales team to achieve insight into revenue-driving sales activities and use prospect/customer data to unlock opportunities and drive revenue. Before its partnership with TELUS Digital, the company relied on a Microsoft Dynamics CRM solution that:

- Was not intuitive or easy to use
- Did not fully meet Strato's practical needs or requirements
- Was unable to track Sales Activities (Leads, Accounts, Contacts, Opportunities) in a meaningful way, leading to a lack of insight into the activities driving revenue
- Was not capable of gathering or displaying data in a way that would be useful to sales leaders and employees

Solution

By engaging our team, Strato intended to:

- Establish a Salesforce foundation that will enable future scaling.
- Leverage Gerent's deep expertise in ERP data migration to quickly transfer existing account, lead, opportunity, product, and price book data into Salesforce
- Tee up future solution expansions (to address forecasting, pricing agreement management, etc.)



Outcome

As a result of this initiative, Strato, Inc. can:

- More efficiently track customers, deals, and interactions — thus enabling better relationship management and sales outreach.
- Use data from meaningful reports and dashboards to guide strategic planning and decision-making.
- Operate confidently, knowing the company's data is reliable and protected by a robust security model.
- Drive user adoption by rolling out a user-friendly CRM solution.

